THE LASTING DIFFERENCE

Sustaining nonprofit organisations, leaders & impact

5th Edition

THE LASTING DIFFERENCE®

TOOLS FOR ORGANISATIONAL SUSTAINABILITY

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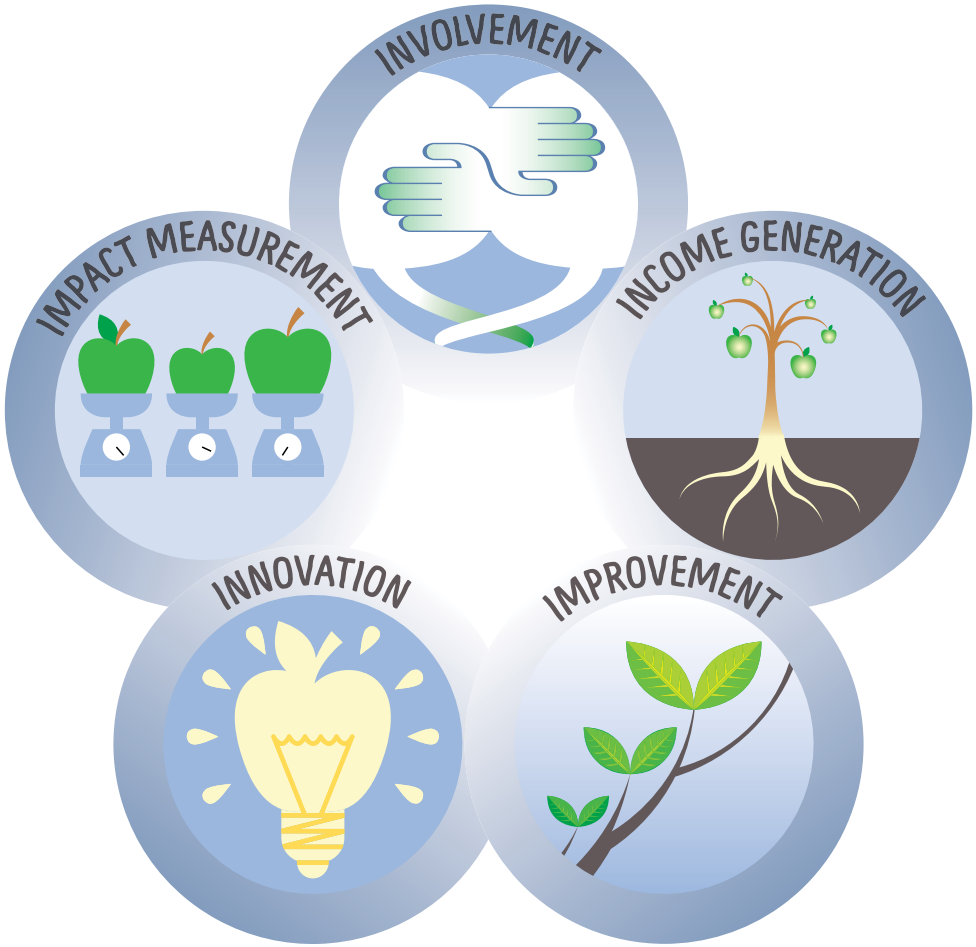

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NOTE ON LANGUAGE AND TERMINOLOGY

This document is aimed primarily at organisations and their managers, but it will also be useful for other staff and services. So, we have used the terms 'organisation', 'project' and 'service' fairly interchangeably and invite you to interpret them in the way that suits you best.

This means that to make the most of this guide, you mustn't treat it as a form filling exercise as there could be parts of it that aren't relevant for you. Use it to facilitate conversations about sustainability with people in different roles and with different perspectives. For example, if you are a manager, involve your trustees or colleagues. If you work in a project, involve people from elsewhere in the organisation.

FOREWORD

This fifth edition launches during a global pandemic. Like the original 2016 edition, it aims to make it easy to assess, prioritise and take action on sustaining non-profit organisations and their impact.

It had already been developed when the crisis hit, but we have reviewed it to ensure its continued relevance. And in fact, the principles and practices are exactly the same. Organisations that survived in the past, present and future:

- Retain a laser-like focus on their core purpose and services
- Evolve and adapt purposefully, knowing that sustainability is about responding to change
- Involve communities and partners, sharing ownership and responsibility.
- Take a holistic approach to income generation, knowing their costs and proving their worth.

Over 6000 organisations around the world have already benefited from the shared framework and practical tools the toolkit provides. This edition sharpens up the indicators of Improvement and Innovation, with clearer principles for Impact Measurement.

WE ARE PROUD TO CONTINUE TO PROVIDE THIS GUIDE AS A FREE RESOURCE ON A CREATIVE COMMONS LICENCE. PLEASE SHARE IT WIDELY SO IT CAN REACH EVERY NON-PROFIT ORGANISATION, DONOR AND FUNDER THAT NEEDS IT.

Graeme Reekie, Director,
Wren and Greyhound

THANK YOU

To all our partners who have helped shape the toolkit over the years, including:

Funders like:

- Corra Foundation
- Impact Funding Partners
- Paths for All
- Scottish Government
- Shared Care Scotland.

Membership and infrastructure bodies like:

- ACOSVO
- CCPS
- Directory of Social Change
- Evaluation Support Scotland
- Quality Scotland
- Scotland's International Development Alliance.

And the 6000+ organisations involved in developing, using and improving this guide since 2014, particularly those who have shared their feedback and resources via **www.TheLastingDifference.com**.

PART ONE: BACKGROUND AND CHALLENGES

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BACKGROUND

Sustainability is the word we use to talk about organisational resilience and development.

Sustainability may seem like the wrong word to use, because of its associations with 'green' or environmental issues. In fact, **environmental** metaphors are very helpful for thinking about sustainability – what is your organisation's ecosystem? What stage is it at in its lifecycle? What's going on in the external environment? Sustainability is a broad enough term to cover a number of other related ideas too.

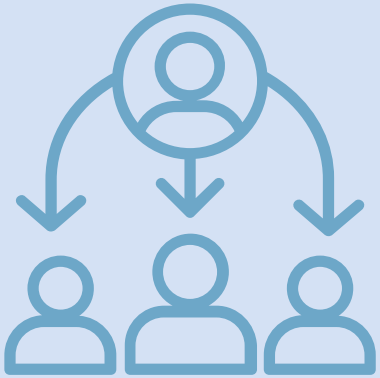
We could just talk about **organisational survival**. But is sustainability really just about survival? Things change – and things end. And that's very important – your organisation won't survive by staying the same. It has to evolve.

We could also talk about **financial viability** – and lots of people think that's all that sustainability really amounts to: if we can earn more than we spend, we're sustainable. But that's a short-term view. It's easy to think of organisations which were financially healthy and still didn't survive because, for example, they were badly run; their staff were undervalued; they ignored their customers; they didn't adapt to change – and so on.

We also need to be honest – it's not all about organisations. What right does your organisation have to exist? Who does it serve? What difference does it make? Sometimes sustainability is about equipping other people not to need us anymore: building **the capacity of people, communities and other services** to sustain things for themselves. Sustainability is really about impact, not organisations.

For all these reasons, we define sustainability as **the capacity of an organisation, service or system to make a lasting difference**. Our research has identified the five core capabilities of sustainable organisations. This toolkit and implementation guide supports you on your journey to managing your sustainability challenges.

SOMETIMES SUSTAINABILITY IS ABOUT EQUIPPING OTHER PEOPLE NOT TO NEED US ANYMORE: BUILDING THE CAPACITY OF PEOPLE, COMMUNITIES AND OTHER SERVICES TO SUSTAIN THINGS FOR THEMSELVES.



CHALLENGES FOR NON-PROFIT ORGANISATIONS

THE CHANGE PARADOX

The paradox of change is that it is only by changing that we can sustain things. When we think about sustainability we think it means surviving as we are. But the world is changing around us, so being sustainable means being prepared for change. We need to adapt and evolve in the face of changing needs, situations and the environment. Put simply, if we don't change and adapt we will get left behind. Therefore sustainability is not the same as sustained.

THE YES/NO PARADOX – OR THE OVER-INFLATED BALLOON

The most common sustainability challenge comes from saying 'yes' too often e.g. to work, referrals and funding. If this makes you feel uncomfortable, look back on your working life and ask yourself:

'Do I regret saying yes more than I regret saying no?'

When we use this question in workshops and conference presentations the sound of pennies dropping is almost audible. It's extremely hard to say no. But services who have done so always speak confidently about it – and the benefits it brought. Some solid evidence is emerging to support this – organisations which have said 'no' to opportunities are reporting that they feel more sustainable. They may have temporarily closed their doors to referrals, or not pursued a funding bid, or taken time to restructure. And in every case they have not only lived to tell the tale, they are stronger for it. More sustainable.

That's not to say it's easy. It may help to think of your organisation as a balloon with finite capacity to expand. Each time you say 'yes' the balloon inflates more and more. But there is only so much air you can put in a balloon before the skin gets too tight. Unless the pressure is released, sooner or later the balloon will burst. Fundamentally the yes/no paradox is about managing capacity in sustainable ways.

CHALLENGES:

THE MAIN SUSTAINABILITY CHALLENGE FOR ANY ORGANISATION IS HOW TO BALANCE CAPACITY WITH DEMAND.

This sounds relatively straightforward, but real-life challenges are much more complex. There are different priorities to be managed and difficult trade-off decisions to be made. There are also complex paradoxes to be reconciled and myths to be challenged.

These are presented here from two perspectives – non-profit organisations and their funders.

THE OCTOPUS PARADOX

Another common sustainability challenge is the octopus-shaped organisation. These organisations have grown in organic ways, reaching out a tentacle towards this funding pot over here, reaching out another to that field of work over there. They have diversified their income by diversifying their activities. But over time the tentacles grow further apart from the body and away from each other. And unless core funding increases, the head and body get proportionally smaller as the tentacles grow.

There comes a time when this becomes unsustainable. That's when organisations need to step back and review their core purpose, to pull in their tentacles. The most common non-profit survival strategy since the financial collapse of 2009 has been to consolidate, refocusing on core purpose.

It's a hard message, but no organisation has the right to exist for its own sake. Sustainable organisations know what they do best, and they know what to let go of. Sustainable strategy means acknowledging that more of something means less of something else.

THE EFFICIENCY PARADOX

The fourth and final paradox is that working efficiently helps sustain our energy and resources, but too much efficiency in an organisation can be counter-productive. Non-profit organisations have always had to be lean, but are under increasing pressure to cut back on the organisational 'centre' – management, administration and overhead costs. Although this is sometimes expedient for saving costs, it is counterproductive. If organisations are too lean, they have no spare capacity or resources. Without these, organisations cannot innovate and improve. This diminishes sustainability. Organisations (and other systems) need spare capacity in order to survive.

Organisations need to have sufficient time, energy and resources to invest in capacity-building for the future. Developing staff and leadership capacity is also essential. Sustainable organisations consider the skills, experience and wellbeing of their staff – and optimise them. If staff are so busy with delivery that they have no time for development, their job satisfaction, motivation and creativity will suffer. The organisation will be efficient – but unsustainable.

CHALLENGES FOR FUNDERS AND COMMISSIONERS

Funders experience many of the same challenges. The funders who work with us to develop sustainability resources and workshops notice that when times are tight there is less appetite in the sector for risk, innovation and development. They also know that projects need help to understand and take action on sustainability. Funders are increasingly looking for organisations to develop their capacity to overcome sustainability challenges. Feedback from funders tells us that this toolkit has proved to be an invaluable resource for supporting funded organisations – and for helping funders to sustain the impact and legacy of funding.

WHAT DOES SUSTAINABLE FUNDING LOOK LIKE?

Some funders are relatively sanguine about sustainability, not expecting funding to make much difference beyond the period of a particular grant or contract. Others believe that funding should make a lasting difference, or that there are benefits to voluntary organisations having a source of reliable funding.

How can we move towards sustainable funding? This isn't easy, as it will mean reversing two currently prevalent trends: short-term funding cycles (typically one to three years' funding) and a disinclination to fund existing services. Sustainable impact takes time. Short-term projects are replacing long-term services, which may be good for adaptation and evolution but bad for efficiency, consistency and planning. Sustainable funding supports sustainable development.

THE MYTH OF PERPETUAL MOTION

Funders try not to create dependency on their funds. It is not sustainable for organisations to return to the same pot time after time, and not just because the pot is limited. Things change, and organisations need to adapt and learn in response. However, the most dangerous and persistent myth about sustainability is the expectation that projects can be sustained once the funding stops.

Early in the funding cycle, funders should support organisations to prepare plans for when the funding ends (see Part Four: Sustainable Impact and Exit Strategies). We need to challenge the myth of the self-sustaining organisation, of the perpetual motion machine that will run forever without input of some kind.

DEEP POCKETS, SHORT ARMS

Funders' application forms almost always ask about how the work will be sustained when the funding stops, and what the project's exit strategy will be. Hardly any offer to define sustainability or give a template for an appropriate exit strategy.

If funders are serious about their funds making a lasting difference they should invest in building capacity for sustainability. Many are already using this guide in their conversations with funded groups and we hope it helps you to do the same.

WE CAN SUMMARISE THESE CHALLENGES INTO FIVE KEY PRINCIPLES OF SUSTAINABILITY

1. **Sustainability does not mean sustained.** Things change. Sustainability means not staying the same.
2. **It's about more than just the money.** Other factors like capacity, development and staff wellbeing are just as important. Experience tells us that money follows good work, not the other way around.
3. **Diversifying activity does not necessarily mean reducing risk.** Sustainability means being clear on what you do – and don't do – best. Sustainable organisations know when to say 'no'. Saying 'yes' to everything leads to reduced quality, safety and sustainability.
4. **Sustainability requires capacity.** Organisations, teams and individuals need time and space to think. Without spare capacity, there can be no innovation or development.
5. **Sustainability does not mean self–sustaining**. On their own, organisations are closed systems which will atrophy without inputs from and exchange with their environments (funding, staff, ideas, support etc.).

The paradoxes, principles, and some of the practices that logically follow are summarised below. More examples of sustainable practices are given under each of the five capabilities in Part Two.

PARADOX / CHALLENGE	PRINCIPLES	PRACTICES
THE CHANGE PARADOX	Sustainability ≠ sustained	Adapt and evolve purposefully
THE YES/NO PARADOX	Sustainability > money	Know what to say 'no' to, when and how
THE OCTOPUS PARADOX	Diversifying activity ≠ reducing risk	Focus on core purpose
THE EFFICIENCY PARADOX	Sustainability requires capacity	Invest in capacity building
THE MYTH OF PERPETUAL MOTION	Sustainability ≠ self-sustaining	Prepare for funding to end
DEEP POCKETS, SHORT ARMS		Build capacity for sustainability

HOW TO USE THE TOOLS

This toolkit helps organisations to assess and address their sustainability through:

- **A self-assessment and action plan templates**
- **A visual scoring summary**
- **An individual leadership and implementation guide**
- **A summary of exit strategies**
- **An exit strategy template**

These are designed to be used flexibly and we encourage you to find your own ways to do so. To get you started, these are examples of ways they have already been used successfully:

ICON GUIDE:

- **PROVOCATIONS TO ENCOURAGE REFLECTION**
- **PRINCIPLES & PRACTICES**
- **SELF-ASSESSMENT**
- **ACTION PLAN TEMPLATE**

Use as a service health check

Run a stakeholder workshop, seek feedback and make a clear request for shared 'ownership' of a piece of work

Use them to focus conversations between funders and services, for example at a funding review meeting

Develop an organisational sustainability plan

Design a workshop for colleagues and/or Boards

Carry out reviews to assess the likelihood of a service's impact being sustained

Identify project learning to share with colleagues

Inform funding applications

Structure strategic planning and reviews

Carry out a sustainability assessment before planning or seeking funding for a new project

Use in staff appraisals, identify role in supporting sustainability

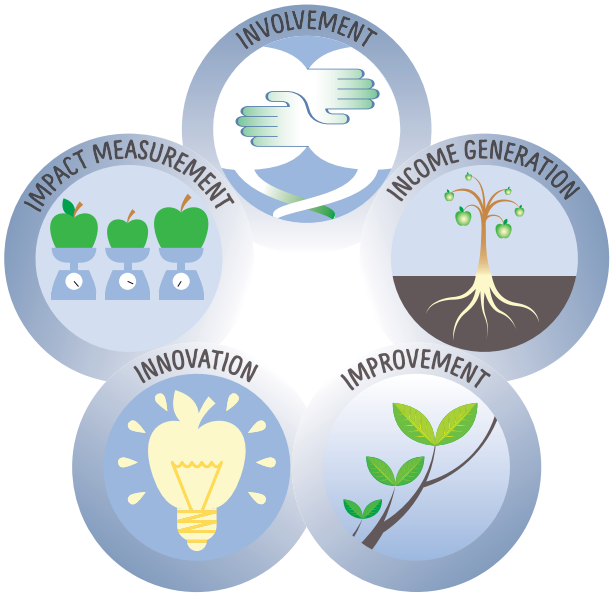
RECOMMENDATIONS

- **DON'T WAIT TOO LONG**
  The tools are particularly powerful if used 6–12 months before a project or funding period ends.
- **ITERATE**
  Revisit the toolkit over 2–3 sessions. It's not a form filling exercise and you don't need to do it all in one go.
- **GET OTHER PEOPLE'S PERSPECTIVES**
  For example compare your results with your manager or Board.
- **PRIORITISE ISSUES**
  The scoring guide and visual score summary should help.
- **TAKE ACTION**
  You will learn a lot from a self-assessment, but draw conclusions and take action on them.
- **IDENTIFY STRENGTHS**
  To build on, not just weaknesses to address.

HOW LONG WILL IT TAKE?

1. **One hour of staff development time** should be enough to read and reflect on at least one capability (e.g. innovation or income generation).
2. **A two-hour sustainability session** with a colleague should allow time to talk through and start evidencing two or more capabilities.
3. **A three-hour sustainability session during a board or team meeting** will probably be enough to discuss two capabilities in some detail.
4. **A sustainability away day** can be designed to cover all the capabilities as well as action planning.

THIS TOOLKIT IDENTIFIES FIVE CORE, INTERRELATED CAPABILITIES AS THE FOUNDATIONS OF SUSTAINABILITY:



Each capability is made up of two elements (the 10 Ps below). In turn, each of these contains six indicators:

CAPABILITY	ELEMENTS	INDICATORS
INVOLVEMENT	PARTICIPATION	Each element is made up of six indicators
	PARTNERSHIP	
INCOME GENERATION	POUNDS AND PENCE	
	PROFILE	
INNOVATION	PEOPLE	
	PIONEERING	
IMPROVEMENT	PURPOSE	
	PROCESS	
IMPACT MEASUREMENT	PROVING	
	POLICY	

DEFINITION:

The principles we have discussed lead us to a new definition of sustainability:

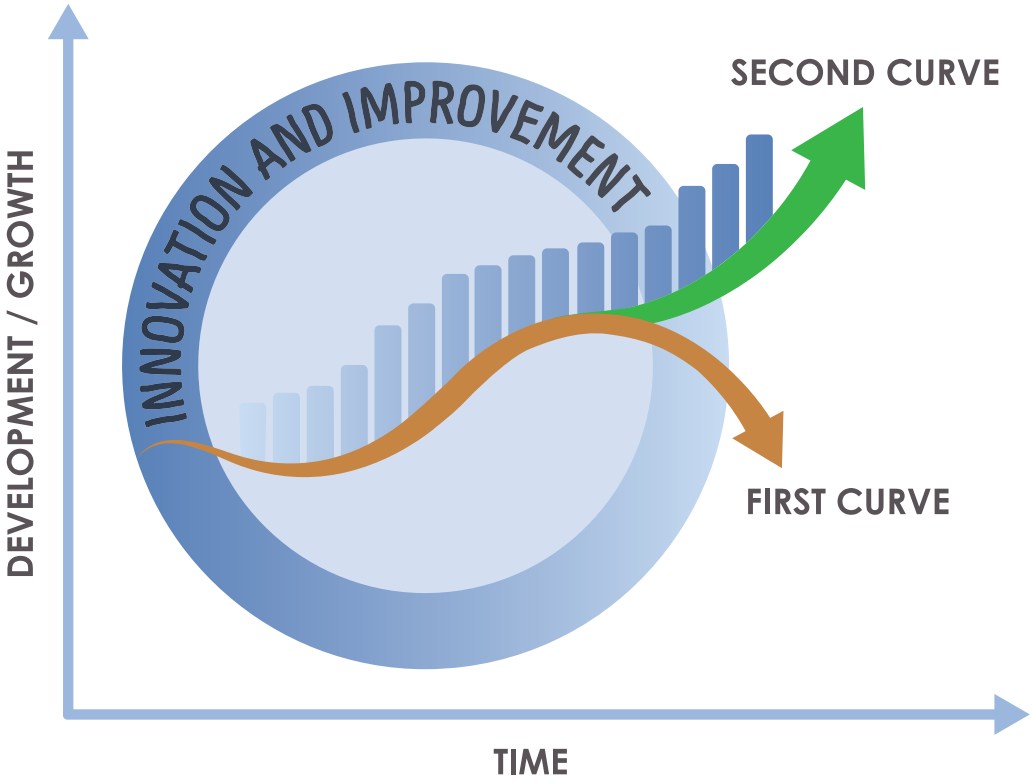
THE CAPACITY TO MAKE A LASTING DIFFERENCE

In earlier versions of the guide the definition of sustainability was about 'an organisation or service's capacity'. But we have broadened it following feedback from funders and policy makers who are interested in sustainable systems and the environmental influences on sustainability.

Each section that follows is based on one of the five capabilities. Core principles and practices are introduced, followed by self-assessment and action planning templates. Finally, a timeline is used to show what can be done about each capability at different stages in an organisational or project lifecycle.

Sustainability is not about keeping things the way they are or preserving the status quo. It means accepting change and recognising that some things end. The tricky thing can be knowing when and what to change.

In any lifecycle, including organisations and services, there are periods of growth and decline. The time to take action on sustainability is when things are going well. Charles Handy[1] calls this the 'second curve' – being ready to start a new period of growth before decline sets in.



1 See Further Reading on page 38

IT'S NEVER TOO EARLY TO START. USE THE IDEAS AND TIMELINES IN THE FOLLOWING SECTION TO TAKE ACTION NOW...

PART TWO: THE FIVE CAPABILITIES

INVOLVEMENT 16

INCOME GENERATION 20

INNOVATION 24

IMPROVEMENT 28

IMPACT MEASUREMENT 32

THE 5 CAPABILITIES

INVOLVEMENT

PRINCIPLES

- Involvement supports sustainability, sharing ownership and generating buy-in from people, communities, staff, board members and partners.
- Solutions can and should come from the people who care most about an issue.
- Sustainability is a complex, adaptive challenge and there are no right or easy answers. Involving people in defining, exploring and solving challenges increases your chances of success.
- Meaningful involvement requires time and resources. It's an investment and doesn't happen by magic. It also takes persistence, patience, respect, trust, honesty, equality and reciprocity.
- It is a privilege to be involved in people's lives.
- Involvement is reciprocal. People are often willing to support you, but are you ready to enlist and accept their goodwill? Be clear on what people get from their involvement – and what you need from them.

PRACTICES – IDEAS FOR ACTION

- Be clear on your parameters for involvement – who you are involving, why and at what 'level'?
- Make it easy for people to get involved – use different methods, times and approaches.
- Always give feedback on what happens as a result of involvement.
- Make sure you have the right environment, culture and rationale in place before you consider entering into a partnership.
- Partnerships can be challenging, so it is important to remember the aims and goals you and your partners share. Revisiting them together can be helpful.
- Be clear on what you bring and how you add value to partners (particularly donors, funders and commissioners). Ask them how you can help them meet their priorities (these might not be the obvious 'presenting' priorities). Why have they chosen to work with you?
- Follow good practice from guides like **IAP2.org** and **VoiceScotland.org.uk**.

PROVOCATION:

WHO DOES YOUR WORK BELONG TO?

SELF–ASSESSMENT: INVOLVEMENT

	PARTICIPATION	SCORE	YOUR NOTES
1	We are clear on who we want to **reach** with our work (e.g. numbers, demographics, location).		
2	We identify the **needs** and **aspirations** of our stakeholders and the people we work with – and change our services in response to these.		
3	We understand the **types and levels** of involvement people want to have with us and have a range of appropriate opportunities for them to do so.		
4	We involve people in generating ideas and exploring different ways to run or **sustain** the service.		
5	We are clear on the outcomes and **benefits** of involvement, for our organisation and the people we work with.		
6	We prioritise accessibility and equality. Other than our eligibility criteria there are no **barriers** to full participation.		
	PARTICIPATION TOTAL =		

	PARTNERSHIP	SCORE	YOUR NOTES
1	We have good, **up to date knowledge** of other organisations, their priorities and what we can achieve by working together.		
2	We **do things** with our people and partners, not to them.		
3	Our staff, volunteers, participants and stakeholders are **partners** in our success. They are involved in the things we do and the decisions we make.		
4	We encourage partners and communities to share **ownership** of our work, e.g. identifying which parts of projects they could support, make referrals to, fund or deliver.		
5	Our systems and **ways of working** tie in with other organisations', where appropriate.		
6	Our partners describe us as effective. **Collaboration** helps us harness resources and achieve things we couldn't do alone.		
	PARTNERSHIP TOTAL =		

The self–assessment section encourages you to assign a score to each indicator, using this suggested scoring guide:

2 = We have good consistent evidence

1 = Our evidence is mixed or patchy

0 = We cannot evidence this

However, there is also space for you to make notes and comments. These will sometimes be more meaningful than just a score, for example if you are discussing results with colleagues, or reviewing progress over a period of time.

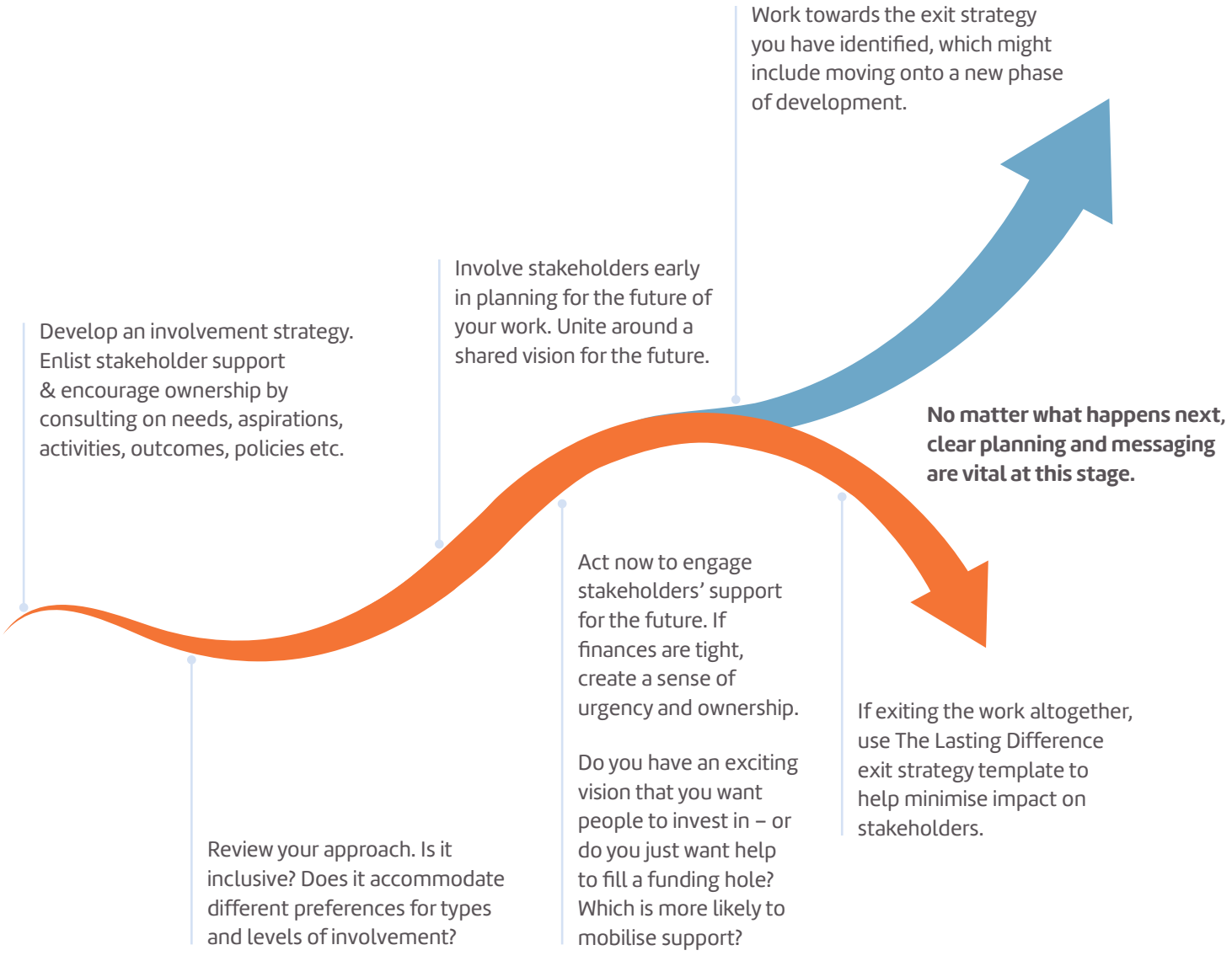
ACTION PLAN: INVOLVEMENT

	DESIRED OUTCOME What needs to be achieved?	ACTION What needs to be done?	OWNERSHIP Who will do it?	TIMESCALE When will it be done by?	REVIEW When and how will progress be reviewed?
PARTICIPATION					

	DESIRED OUTCOME What needs to be achieved?	ACTION What needs to be done?	OWNERSHIP Who will do it?	TIMESCALE When will it be done by?	REVIEW When and how will progress be reviewed?
PARTNERSHIP					

Your self-assessment should help you to prioritise the elements you want to work on. You can now use the planning template to make a systematic, detailed action plan. Remember it's not a form-filling exercise, leave sections blank if appropriate. For more ideas of actions you can take at any stage in your project or organisation's lifecycle, see the timeline on the following page.

TIMELINE: INVOLVEMENT


Develop an involvement strategy. Enlist stakeholder support & encourage ownership by consulting on needs, aspirations, activities, outcomes, policies etc.
Involve stakeholders early in planning for the future of your work. Unite around a shared vision for the future.
Work towards the exit strategy you have identified, which might include moving onto a new phase of development.
No matter what happens next, clear planning and messaging are vital at this stage.
Review your approach. Is it inclusive? Does it accommodate different preferences for types and levels of involvement?
Act now to engage stakeholders' support for the future. If finances are tight, create a sense of urgency and ownership.
Do you have an exciting vision that you want people to invest in – or do you just want help to fill a funding hole? Which is more likely to mobilise support?
If exiting the work altogether, use The Lasting Difference exit strategy template to help minimise impact on stakeholders.

This timeline can be adapted to different project timescales or stages in an organisation's development or lifecycle.

See Part 3 for ideas on leading these changes in your organisation and exit strategies for any situation.

THE 5 CAPABILITIES

INCOME GENERATION

PRINCIPLES

- Income generation means taking a holistic approach to all sources of revenue: grants, contracts, donations, events sponsorship, trading and investment. Most organisations are strong in one or two areas but will increasingly need to learn about others.
- Funders and donors are customers and partners. They give you something in exchange for something else.
- Think about each source of income you have. Follow it back in time – where did it come from? Income often comes from relationships. Relationships take time. What are you doing now to generate income for two years' time and beyond?
- Effective marketing is where quality, customer service and communication intersect. In this way of thinking, marketing is everyone's job.
- It's okay to use word of mouth marketing, but don't rely on it without supporting it.

PRACTICES – IDEAS FOR ACTION

- Know your markets and customers – what do they need? Why do they come to you? Who else might share these needs?
- Be clear what you offer – and what you don't. Saying no is necessary for maintaining quality, purpose and identity.
- Cultivate, nurture and prioritise existing relationships. This is cheaper and more effective than developing new ones. How do you develop and reward loyalty?
- Ensure colleagues at all levels understand their role in promoting the organisation.
- Use 'AIDA' to assess the effectiveness of your marketing and promotion. Traditional marketing generates Awareness and Interest. Decision-making and Action require higher bandwidth communication (face to face, events, meetings, video etc).
- Consider a network approach to income generation e.g. joint promotion; consortia/ joint funding bids; influencing policy and decision makers via membership bodies.

PROVOCATION:

MONEY FOLLOWS GOOD WORK, NOT THE OTHER WAY AROUND.

SELF-ASSESSMENT: INCOME GENERATION

	POUNDS AND PENCE	SCORE	YOUR NOTES
1	We have an effective, holistic **income generation strategy** that aligns marketing, communication, stakeholder engagement and fundraising.		
2	We identify and review our projects' true **costs** and make sure these are covered by funding. When this is not the case it is for clearly expressed strategic reasons.		
3	We receive funding from an appropriate **range of sources**.		
4	We are clear on the **value** we can add to funders **without being led** by their requirements.		
5	We actively **track** when funding for projects or posts is due to end and put plans in place to review or renew it. Staff and trustees are involved in this.		
6	We identify and take action on **financially failing projects**.		
	POUNDS AND PENCE TOTAL =		

	PROFILE	SCORE	YOUR NOTES
1	Our approach to **raising our profile** is consistent with our core purpose and the impact we want to make for our communities.		
2	We have identified our existing and potential **markets**.		
3	We promote the organisation and its projects with clear **messages**, to clearly identified **audiences**, using appropriate **methods**.		
4	We measure the **effectiveness and cost-effectiveness** of the promotional and income generation work we do.		
5	**Colleagues** at all levels (e.g. managers, staff, trustees) are clear on their role in promoting the organisation.		
6	We have identified **advocates** (e.g. participants, partners, referrers) who help to promote our work and reach new audiences.		
	PROFILE TOTAL =		

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POUNDS AND PENCE					

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PROFILE					

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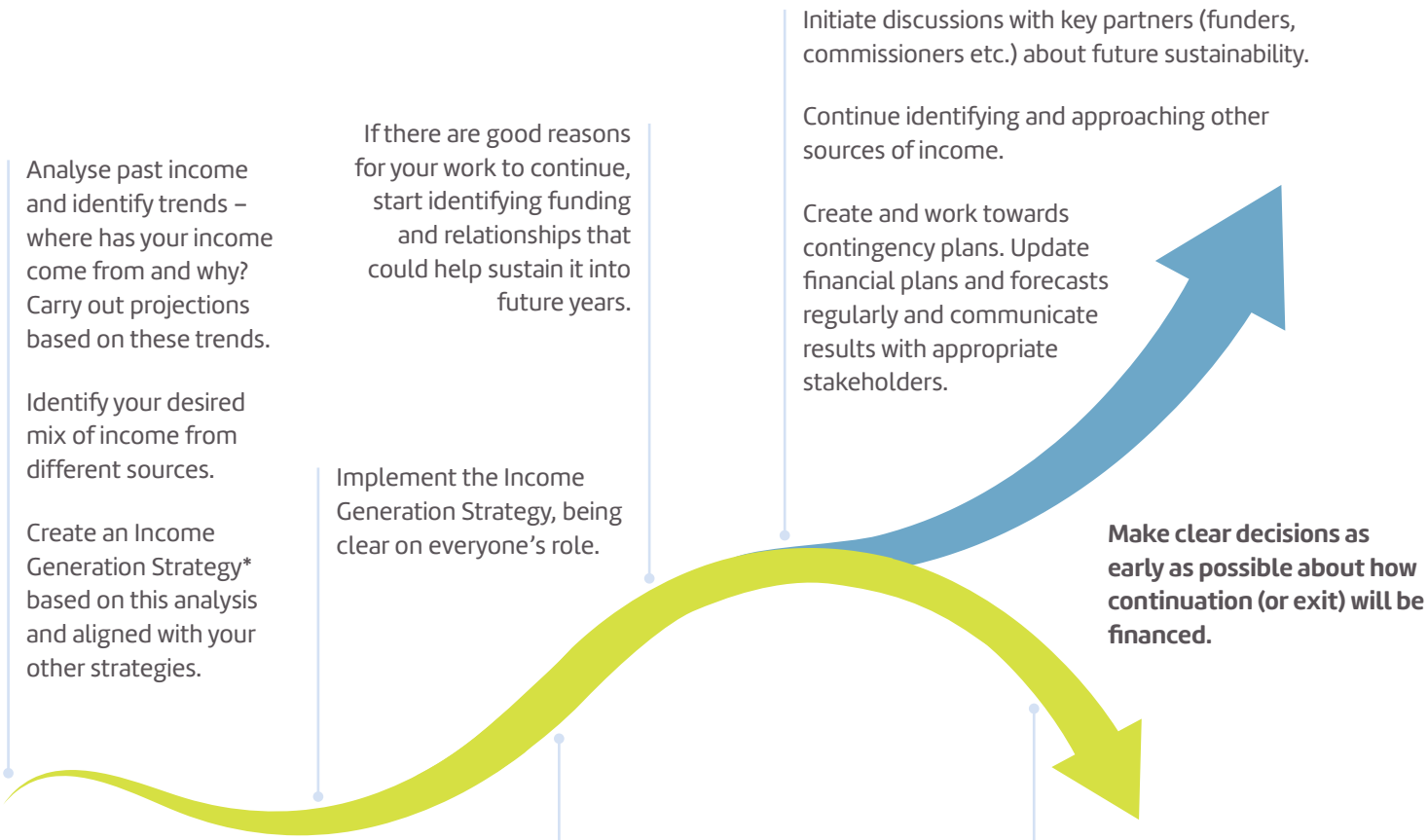
TIMELINE: INCOME GENERATION



Analyse past income and identify trends – where has your income come from and why? Carry out projections based on these trends.

Identify your desired mix of income from different sources.

Create an Income Generation Strategy* based on this analysis and aligned with your other strategies.

If there are good reasons for your work to continue, start identifying funding and relationships that could help sustain it into future years.

Implement the Income Generation Strategy, being clear on everyone's role.

Initiate discussions with key partners (funders, commissioners etc.) about future sustainability.

Continue identifying and approaching other sources of income.

Create and work towards contingency plans. Update financial plans and forecasts regularly and communicate results with appropriate stakeholders.

Make clear decisions as early as possible about how continuation (or exit) will be financed.

Review costs. If something doesn't contribute to your outcomes (or cover costs), ask yourself why you do it.

Check that you are using your resources to the fullest (including premises and partnerships).

If you are considering exit, check your constitution or governing documents. Finances may need to be handed back to funders or passed on to another group with similar charitable purposes.

*template available at **www.TheLastingDifference.com**

This timeline can be adapted to different project timescales or stages in an organisation's development or lifecycle.

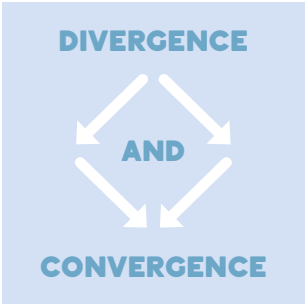
See Part 3 for ideas on leading these changes in your organisation and exit strategies for any situation.

THE 5 CAPABILITIES

INNOVATION

PRINCIPLES

- Innovation supports sustainability because it improves your ability to adapt and evolve.
- Radical new ideas and breakthroughs are rare. Most innovation is about incremental improvement in what is already there.
- People are motivated to make a positive difference and will do so given the resources and space.
- Leadership and culture can nourish innovation – or crush it.
- Good ideas are everywhere. The brightest people don't all work for you.
- There's a time for 'going wide', with divergent thinking and opening up to new ideas. And there's a time for converging, narrowing down and selecting (and deselecting) options. Knowing which stage you are in is vital.



PRACTICES – IDEAS FOR ACTION

- Develop a supportive and trusting culture of learning.
- Encourage experimentation, play, and sensible risk taking.
- Collaborate to innovate. Encourage creative debate. Seek out and listen to different perspectives.
- Agree the outcomes and vision for innovation – and then get out of people's way!
- Pilot ideas – do small tests of change – fail fast.
- Change your routines, get out of the office – meet and work in places that nurture creative thinking.
- Recognise overload and deal with it before generating more ideas. Give yourself and others the time and space to think, read, reflect, ponder and recharge.
- Screen new ideas against your core purpose, aims, values and capacity – you can find templates that other organisations use for this at **www.TheLastingDifference.com**.

PROVOCATION:

WE ARE ALL CREATIVE. BUT WE NEED TIME, TRUST AND PERMISSION TO PLAY. AND, AT TIMES, TO FAIL!

SELF–ASSESSMENT: INNOVATION

	PEOPLE	SCORE	YOUR NOTES
1	People are **committed** to the organisation's vision, culture and ethos.		
2	We **invest** in innovation, ideas and inspiration, allocating time and resources so everyone can contribute.		
3	We **screen and select** new ideas to make sure they don't pull us off course.		
4	We encourage **collaborative and networking** activities which support problem-solving, idea generation and **celebrating success**.		
5	Staff and volunteers are **supported to develop** within and beyond their current roles, e.g. job shadowing, mentoring, attending conferences.		
6	Information and innovations are **shared effectively** between staff, management and trustees.		
	PEOPLE TOTAL =		

	PIONEERING	SCORE	YOUR NOTES
1	Our organisational **culture** encourages and supports innovation. Experimentation, risk and failure are valued, within safe limits.		
2	We actively support organisational and service **development** (e.g. via pilots, short term projects, learning exchange). We capture the learning and exploit the opportunities that emerge.		
3	We work with other organisations to innovate **new approaches** to common challenges.		
4	Leaders act as **change agents**, challenging team members to critically explore and frame problems and encouraging innovative solutions.		
5	Our **problem-solving** and **decision-making** processes allow us to carefully consider the available evidence, weigh up the options and involve the right people.		
6	We are a **learning organisation** using everyone's knowledge and skills to produce solutions to challenges.		
	PIONEERING TOTAL =		

The self–assessment section encourages you to assign a score to each indicator, using this suggested scoring guide:

2 = We have good consistent evidence

1 = Our evidence is mixed or patchy

0 = We cannot evidence this

However, there is also space for you to make notes and comments. These will sometimes be more meaningful than just a score, for example if you are discussing results with colleagues, or reviewing progress over a period of time.

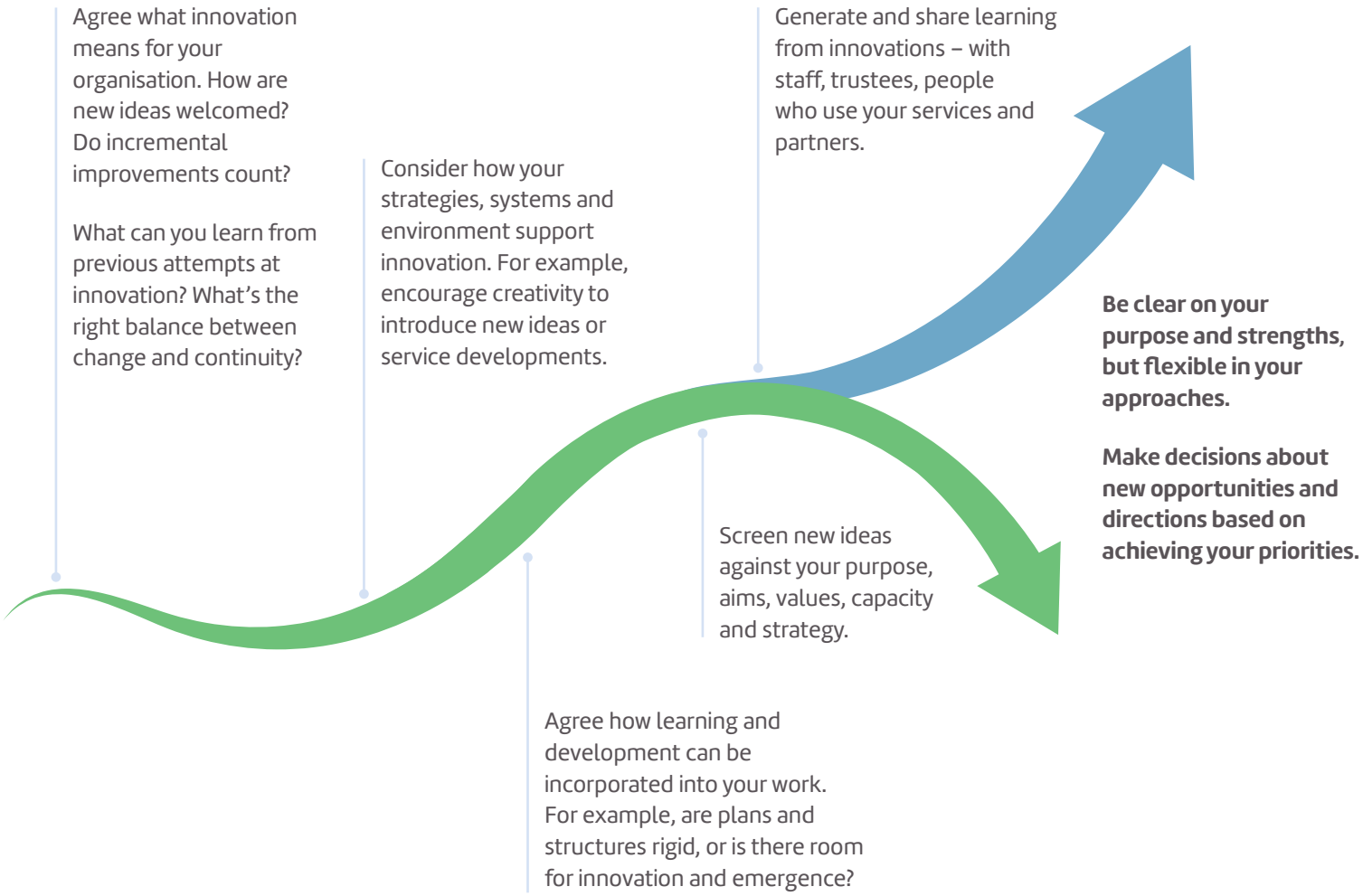
ACTION PLAN: INNOVATION

	DESIRED OUTCOME What needs to be achieved?	ACTION What needs to be done?	OWNERSHIP Who will do it?	TIMESCALE When will it be done by?	REVIEW When and how will progress be reviewed?
PEOPLE					

	DESIRED OUTCOME What needs to be achieved?	ACTION What needs to be done?	OWNERSHIP Who will do it?	TIMESCALE When will it be done by?	REVIEW When and how will progress be reviewed?
PIONEERING					

Your self-assessment should help you to prioritise the elements you want to work on. You can now use the planning template to make a systematic, detailed action plan. Remember it's not a form-filling exercise, leave sections blank if appropriate. For more ideas of actions you can take at any stage in your project or organisation's lifecycle, see the timeline on the following page.

TIMELINE: INNOVATION



Agree what innovation means for your organisation. How are new ideas welcomed? Do incremental improvements count?

What can you learn from previous attempts at innovation? What's the right balance between change and continuity?

Consider how your strategies, systems and environment support innovation. For example, encourage creativity to introduce new ideas or service developments.

Generate and share learning from innovations – with staff, trustees, people who use your services and partners.

Be clear on your purpose and strengths, but flexible in your approaches.

Make decisions about new opportunities and directions based on achieving your priorities.

Screen new ideas against your purpose, aims, values, capacity and strategy.

Agree how learning and development can be incorporated into your work. For example, are plans and structures rigid, or is there room for innovation and emergence?

This timeline can be adapted to different project timescales or stages in an organisation's development or lifecycle.

See Part 3 for ideas on leading these changes in your organisation and exit strategies for any situation.

THE 5 CAPABILITIES

IMPROVEMENT

PRINCIPLES

- Improvement is about getting better all the time. Improvement can be incremental (happening over a period of time) or radical (major improvements happening quickly).
- What matters is that organisational culture and behaviours support improvement – and change. Do the organisation's structures and systems encourage improvement initiatives – or inhibit them?
- Improvement initiatives should link clearly to the organisation's mission and strategy. This can also help to make sure the right initiatives are prioritised.
- Improvement cannot happen without spare capacity (having the time, energy and resources to invest in change).
- It is possible for individuals, teams and organisations to improve, and those changes can be sustained over time.

PRACTICES – IDEAS FOR ACTION

- Develop a vision for improvement that unites everyone in the organisation.
- Manage individual, team and organisational capacity to protect staff wellbeing and the organisation's quality, values and reputation.
- Use quality frameworks to explore your organisation's practices and find out what needs to improve. Tools like EFQM **www.efqm.org**, Trusted Charity **www.ncvo.org.uk**, and Measuring Up! **www.inspiringimpact.org** can help. The Enablers section of the EFQM Excellence Model **www.qualityscotland.co.uk** supports improvement in key areas such as people, strategy and processes. Investors in People (IIP) and Investing in Volunteers (IiV) are quality standards designed to support improvement in relation to people.
- To improve staff development and training, use secondments, work shadowing, peer support groups and learning exchanges. Download our companion guide **Lasting Leadership** for more inspiration.
- Benchmark your quality and practices against other organisations in similar and different fields.

PROVOCATION:

WHAT ARE YOU TRYING TO ACHIEVE? BUSYNESS IS NOT THE SAME AS FORWARD MOTION.

SELF-ASSESSMENT: IMPROVEMENT

	PURPOSE	SCORE	YOUR NOTES
1	The organisation and its projects are united by a **shared vision and purpose** that everyone understands.		
2	We strike a good balance between planning and **responsiveness**. Our strategic and operational plans set parameters but leave room for creativity and emergence.		
3	Our strategies are **well aligned**. Organisational strategy informs (and is informed by) operational and project plans.		
4	We **embody our values** and **embed learning** and reflection in everyday practice at all levels of the organisation.		
5	We navigate and **manage external pressures** (e.g. money, societal changes, stakeholders) to make sure we work within capacity without compromising our values.		
6	We recognise when **capacity** is overstretched and take action to balance demand and capacity so that quality, safety and staff wellbeing are not compromised.		
	PURPOSE TOTAL =		

	PROCESS	SCORE	YOUR NOTES
1	We work to achieve and sustain **results** that meet or exceed the needs and expectations of our customers, staff and stakeholders.		
2	We systematically measure and improve the **quality** of our work.		
3	We routinely **seek and respond** to feedback about how we can improve.		
4	Our **board** and/or **committees** are diverse, well established, and have the right skills and experience to guide our work. Their make-up and effectiveness are regularly reviewed.		
5	We take a holistic approach to **risk management** and identify and respond to opportunities and threats effectively.		
6	We continue to **review and refine** our approach, including services, staffing and structures.		
	PROCESS TOTAL =		

The self-assessment section encourages you to assign a score to each indicator, using this suggested scoring guide:

2 = We have good consistent evidence

1 = Our evidence is mixed or patchy

0 = We cannot evidence this

However, there is also space for you to make notes and comments. These will sometimes be more meaningful than just a score, for example if you are discussing results with colleagues, or reviewing progress over a period of time.

ACTION PLAN: IMPROVEMENT

PURPOSE

DESIRED OUTCOME What needs to be achieved?	ACTION What needs to be done?	OWNERSHIP Who will do it?	TIMESCALE When will it be done by?	REVIEW When and how will progress be reviewed?

PROCESS

DESIRED OUTCOME What needs to be achieved?	ACTION What needs to be done?	OWNERSHIP Who will do it?	TIMESCALE When will it be done by?	REVIEW When and how will progress be reviewed?

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TIMELINE: IMPROVEMENT

Develop a clear vision and identity. Agree this with stakeholders to support longer term buy-in.

Assess and manage individual, team and organisational capacity.

Use evaluation and feedback to improve your ways of working.

Start attending or organising events to share your learning and influence practice.

Generate and share learning. This is likely to be why people funded or supported the work. To plan or fund a new project you must also be able to evidence the need for it.

Sharing learning is sometimes the only way to ensure a lasting difference. For example, projects or models that wind up (e.g. due to lack of funding) can be more easily resurrected if key learning has been preserved.

Identify recommendations for how the project could be improved in future. This is invaluable for evidencing the need for future work.

Reflect on what can be learned from your work to date. Adapt and change if things aren't going to plan. Communicate this with stakeholders (funders, trustees etc.).

This timeline can be adapted to different project timescales or stages in an organisation's development or lifecycle.

See Part 3 for ideas on leading these changes in your organisation and exit strategies for any situation.

THE 5 CAPABILITIES

IMPACT MEASUREMENT

PRINCIPLES

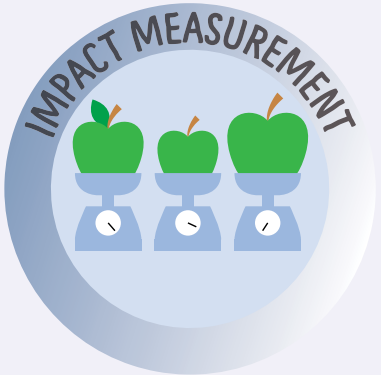
- To be sustainable, organisations need convincing evidence of need and compelling stories of impact.
- Long term change takes time, but you can evidence smaller changes along the way. Set realistic outcomes and focus less on 'attribution' and more on 'contribution'.
- One size does not fit all. Check that off-the shelf evaluation tools will really give you what you need, otherwise develop your own evaluation methods and tools.
- Outcome indicators are measures of success. Unlike most outcomes, they are inherently specific and measurable. To set indicators, break the outcome down by asking 'What does the outcome look like in practice?'.
- From a sustainability point of view, self-evaluation is more valuable than external evaluation. You learn more and it's cheaper. What it loses in terms of independence, it gains in demonstrating your commitment to reflection and learning. As the saying goes, consultants borrow your watch to tell you the time...then leave with your watch.

PRACTICES – IDEAS FOR ACTION

- Be clear on what you are trying to achieve and therefore measure. Clear outcomes and indicators help avoid the most common evaluation pitfalls.
- Triangulate – gather and present data from different sources. This minimises 'evaluation fatigue' for the people you work with and strengthens the credibility of your evidence.
- Use quantitative and qualitative data together to tell a rounded story. Quantitative data provides breadth and qualitative information gives depth.
- Short reports take longer to write. Save time by doing your analysis first – don't expect (or trust) your reader to do it for you. For structure and brevity, ask yourself 'what?', 'so what?', 'what then?'.
- Identify the story you want to tell. What was the context or starting point? What happened along the way (including challenges)? What difference was made? What was learned? What will be done differently in future?
- If you are using an external quality assurance framework, avoid duplication by aligning your evaluation system to it.

PROVOCATION:

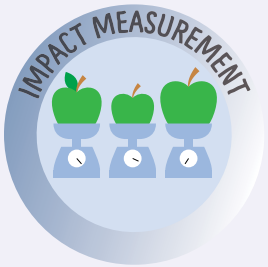
WHAT'S YOUR STORY? WHAT MESSAGES ARE YOU SENDING? AND RECEIVING?



SELF-ASSESSMENT: IMPACT MEASUREMENT

	PROVING	SCORE	YOUR NOTES
1	We have recent, relevant **evidence of need**, based on research and/or genuine consultation with a range of stakeholders.		
2	We use **good quality** evidence to support impact measurement. We gather information from a range of sources, including practitioners, beneficiaries, third parties and others.		
3	We systematically **evaluate our work** and outcomes (the difference we make).		
4	Evaluation helps us to **learn and improve**. We are interested in finding out what works – and what doesn't.		
5	Evaluation informs future planning. We **review** our work before developing new services or projects.		
6	We **communicate** evaluation findings with key stakeholders (participants, partner organisations, funders etc.).		
	PROVING TOTAL =		

	POLICY	SCORE	YOUR NOTES
1	We identify the local and national **strategies** our work contributes to and refer to these in our own strategies.		
2	We actively **scan** the external and policy environment to identify developments in our field.		
3	We have good **links to policy** and commissioning, directly or through appropriate intermediary organisations.		
4	We **demonstrate** to policy makers and strategic commissioners how our work contributes to their work and outcomes.		
5	We use evidence from our consultations and evaluations to **influence** national and local policies and practices.		
6	We are **knowledgeable** about our sector and well connected within it. We are seen as a source of knowledge which others draw upon.		
	POLICY TOTAL =		



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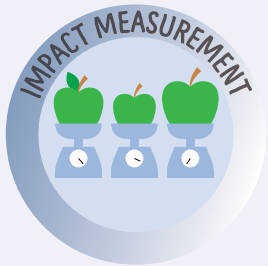
ACTION PLAN: IMPACT MEASUREMENT



	DESIRED OUTCOME What needs to be achieved?	ACTION What needs to be done?	OWNERSHIP Who will do it?	TIMESCALE When will it be done by?	REVIEW When and how will progress be reviewed?
PROVING					

	DESIRED OUTCOME What needs to be achieved?	ACTION What needs to be done?	OWNERSHIP Who will do it?	TIMESCALE When will it be done by?	REVIEW When and how will progress be reviewed?
POLICY					

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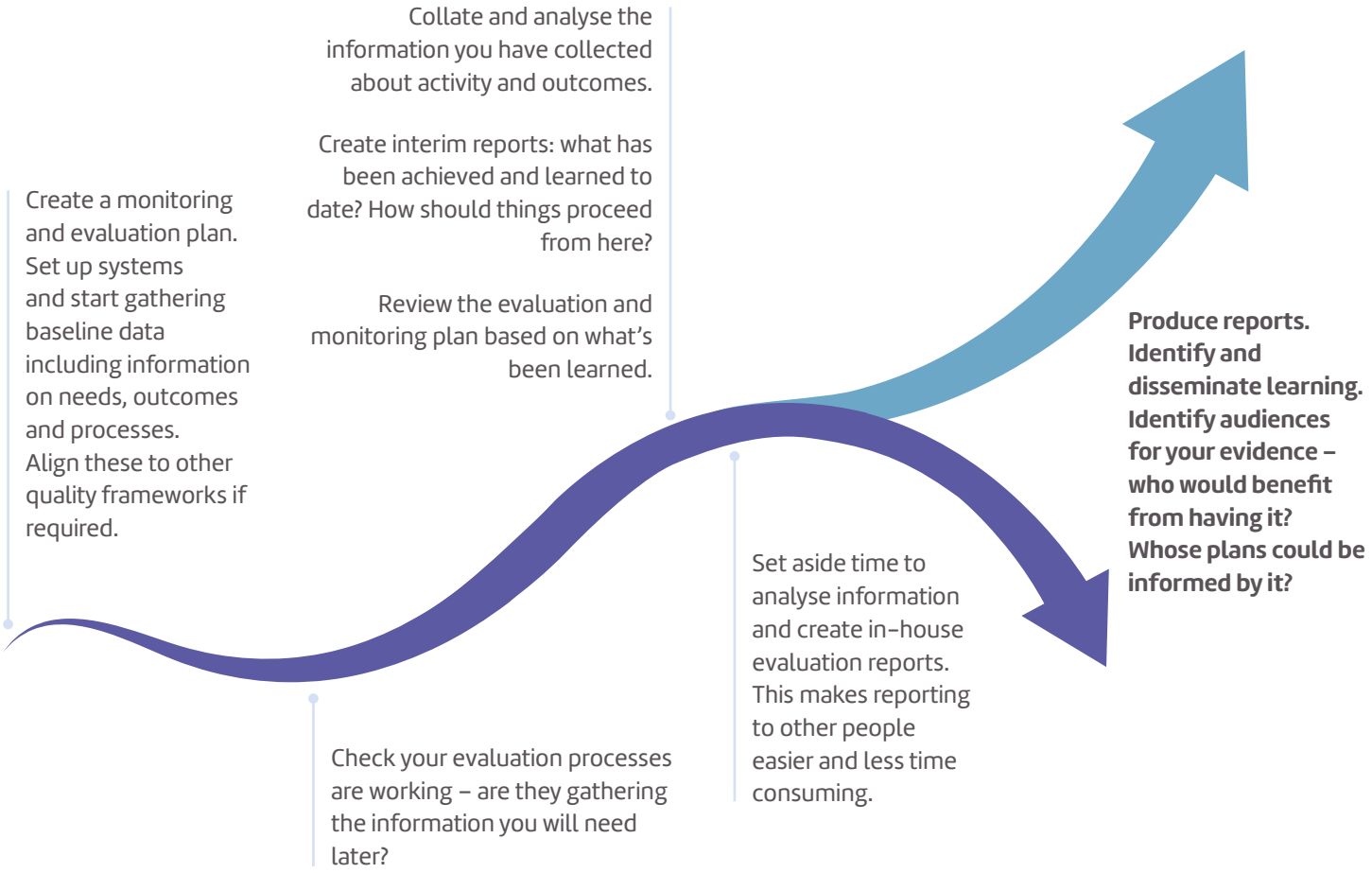
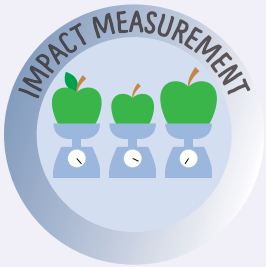
TIMELINE: IMPACT MEASUREMENT


Create a monitoring and evaluation plan. Set up systems and start gathering baseline data including information on needs, outcomes and processes. Align these to other quality frameworks if required.
Collate and analyse the information you have collected about activity and outcomes.
Create interim reports: what has been achieved and learned to date? How should things proceed from here?
Review the evaluation and monitoring plan based on what's been learned.
Check your evaluation processes are working – are they gathering the information you will need later?
Set aside time to analyse information and create in-house evaluation reports. This makes reporting to other people easier and less time consuming.
Produce reports. Identify and disseminate learning. Identify audiences for your evidence – who would benefit from having it? Whose plans could be informed by it?



This timeline can be adapted to different project timescales or stages in an organisation's development or lifecycle.

See Part 3 for ideas on leading these changes in your organisation and exit strategies for any situation.

VISUAL SCORE SUMMARY

Highlight your totals from each of the tables above. Use these to support your action planning.

For example, think about:

What score you would like to have in each area?

What would that look like?

What would it take to get there?

You can use the visual summary to share or present your findings with colleagues – but remember, it's not the score itself that matters, but the information behind it, and what you can do as a result.

PARTICIPATION	0	1	2	3	4	5	6	7	8	9	10	11	12
PARTNERSHIP	0	1	2	3	4	5	6	7	8	9	10	11	12
POUNDS & PENCE	0	1	2	3	4	5	6	7	8	9	10	11	12
PROFILE	0	1	2	3	4	5	6	7	8	9	10	11	12
PEOPLE	0	1	2	3	4	5	6	7	8	9	10	11	12
PIONEERING	0	1	2	3	4	5	6	7	8	9	10	11	12
PURPOSE	0	1	2	3	4	5	6	7	8	9	10	11	12
PROCESS	0	1	2	3	4	5	6	7	8	9	10	11	12
PROVING	0	1	2	3	4	5	6	7	8	9	10	11	12
POLICY	0	1	2	3	4	5	6	7	8	9	10	11	12

NOTES FROM PART TWO

CAPABILITIES AND SELF-ASSESSMENT

FURTHER READING

Embracing Complexity: Strategic perspectives for an age of turbulence
J.G. Boulton et al, Oxford University Press, 2015

Lasting Leadership: A guide to sustainable leadership for non-profit organisations,
Wren & Greyhound, 2020

Making a Lasting Difference: Sustaining nonprofit organisations and their impact
G. Reekie, Wren and Greyhound, 2019

Our Iceberg Is Melting: Changing and Succeeding Under Any Conditions
J. Kotter & H. Rathberger, Macmillan, 2005

The Art of Exit: In search of creative decommissioning
NESTA, 2012, www.nesta.org.uk

The Second Curve: Thoughts on Reinventing Society
C. Handy, Random House Business, 2016

The Sustainability Formula: How Nonprofit Organizations can thrive in the Emerging Economy
TCC Group, www.tccgrp.com

Thinking about Sustainability
Institute for Voluntary Action Research, 2016, www.ivar.org.uk

Understanding Organizations
C. Handy, Penguin, 1993

PART THREE: IMPLEMENTATION AND INDIVIDUAL LEADERSHIP

IMPLEMENTATION 40

INDIVIDUAL LEADERSHIP 42

IMPLEMENTATION AND INDIVIDUAL LEADERSHIP

Since its launch in 2016, all kinds of organisations have told us The Lasting Difference is relevant to their work and straightforward to use.

They also like that it helps them think more holistically and creatively about sustainability. But as they start using the toolkit, people sometimes also want to know:

- What is the best way to implement the ideas and action plans?
- Who should be involved in doing this?

This part of the guide is designed to help address those questions. Whether you are taking lead responsibility for sustainability, or (ideally) sharing the work with others, this section gives ideas and suggestions for how to implement the Lasting Difference successfully.

In addition to the five sustainability capabilities in Part Two, this part of the guide provides two new and interconnected capabilities: Implementation and Individual leadership. These emerged from our work researching, supporting and learning about the ways that organisations take action on sustainability.

IMPLEMENTATION

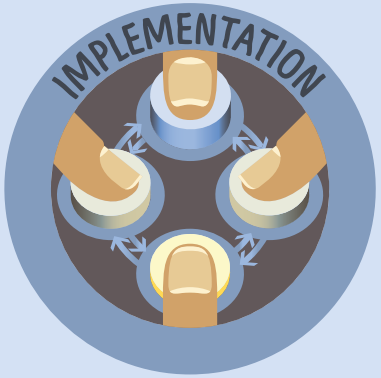
It has been clear since we began working on the topic in 2013 that enlisting the experience, energy and expertise of your colleagues will greatly increase your sustainability success.

Completing the self-assessment section of the toolkit is far easier with other people than alone, and the same goes for implementation. Although some people use it alone, most people use it with colleagues. Not many people involve external stakeholders, but in our experience this can be very powerful and effective and is well worth considering. Whoever you want to involve, and however ready you are, you'll find ideas in the Implementation section below.

TWO CAPABILITIES:

IMPLEMENTATION AND INDIVIDUAL LEADERSHIP

To help you to identify and develop your sustainability processes, priorities, and the contribution people can make to them, this section has been designed around two capabilities.



INDIVIDUAL LEADERSHIP

Understanding your own motivations, assumptions and sources of influence will help you bring others along with you. The self-assessment helps you to organise your thoughts – and to assess your organisation's readiness for them!

For more ideas and inspiration visit **www.TheLastingDifference.com** for a range of case studies, real-life examples and practical resources from organisations who have used the tools successfully. If you didn't sign up to receive updates when you downloaded the toolkit you can join our mailing list by emailing: **info@wrenandgreyhound.co.uk**.

Both capabilities are made up of two elements, which each have five indicators:

CAPABILITY	ELEMENTS	INDICATORS
IMPLEMENTATION	PLANNING	Each element is made up of five indicators
	PEOPLE POWER	
INDIVIDUAL LEADERSHIP	PRIORITIES	
	PERSONAL POWER	

SCORING INDICATORS

Assign a score to each indicator, using the same scoring guide as in the self-assessment in Part 2.

2 = Good, consistent evidence

1 = Mixed or patchy evidence

0 = No evidence

Just like the five main capabilities, this helps you see where you are doing well, and where you may need to make changes. We encourage you to use your limited time, capacity and resources sensibly. Don't treat the self-assessment as a box-ticking exercise; use it to challenge and inform your thoughts and actions. Don't try to complete it all in one go; give yourself time and space to think. And finally, ask yourself whether your resources are better spent addressing weaknesses – or building on strengths.

IMPLEMENTATION

PRINCIPLES

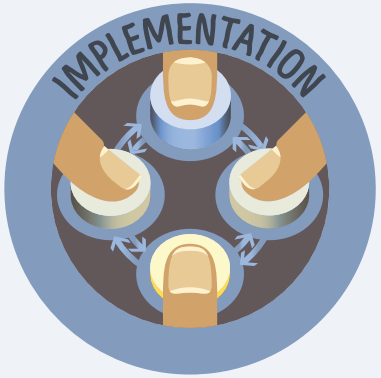
- Without action, the ideas in this toolkit will just be ideas. With action, they are invaluable.
- People who are going to be involved in implementing sustainability plans need to be prepared. Is everyone ready to take forward implementation and do they have the skills and resources they need?
- Development needs may also appear while implementation is underway. Can you build in time for individual and team learning? Where can you find additional learning, support or resources for your team?
- Clear timescales, with checkpoints along the way, give everyone a chance to reflect on progress. This increases ownership of the plans.
- Build time for reflection into your implementation plan. Urgency matters but so does capacity.

PRACTICES – IDEAS FOR ACTION

- Identify a small number of colleagues, trustees or internal or external peers to work with. Do the self-assessment and compare results.
- Form a working group, e.g. a board sub-committee looking at sustainability, or a forum made up of people at all levels of the organisation.
- Use the Lasting Difference indicators to develop action plans. (See our companion guide Lasting Leadership to learn more).
- Agree responsibility for these and monitor progress.
- Maintain a sense of urgency and involvement. Communicate the results of the action plans at regular intervals. Inform people about progress and results – what has been learned and achieved? What difference will it make?
- Look at the toolkit sections on 'How to use the tools', the principles and practices and timelines for more ideas. Visit **www.TheLastingDifference.com** for case studies, free tools and inspiration.
- Share your questions and action plans with Wren and Greyhound, funders, or other people who can put you in touch with leaders who have faced similar challenges.

PROVOCATION:

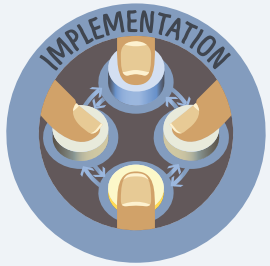
THE RISKS OF STAYING THE SAME ARE GREATER THAN THE RISKS OF CHANGING.



SELF-ASSESSMENT: IMPLEMENTATION

	PLANNING	SCORE	YOUR NOTES
1	We have created a **sustainability plan** with clear priority outcomes, informed by the views of staff, trustees and the people we serve.		
2	Our sustainability outcomes are **aligned** with our strategic outcomes.		
3	We have a process for **assessing and prioritising internal and external risks** to our sustainability.		
4	We **review** activity and progress towards our sustainability plans and adjust our approach if required.		
5	We seek trustworthy **advice** and **guidance** on our sustainability plans when necessary.		
	PLANNING TOTAL =		

	PEOPLE POWER	SCORE	YOUR NOTES
1	Our board and team complete the **self-assessment** section of the Lasting Difference toolkit periodically.		
2	We create the space and time to discuss our self-assessment results, so everyone **understands how they can contribute** to sustainability action plans.		
3	We identify board and team members' **expertise** and **experience** (e.g. communications, fundraising, involvement) to help work towards our sustainability goals.		
4	We have **sustainability 'champions'** who are supported to coordinate activity across the organisation to achieve our sustainability outcomes.		
5	We identify our **key stakeholders**, foster positive, productive **relationships** and engage their support to achieve our sustainability outcomes.		
	PEOPLE POWER TOTAL =		



Complete this section on your own or with input from others.

Consider using your answers as evidence to apply for the **Lasting Difference® Symbol**.

SCORING GUIDE:

2 = Good consistent evidence

1 = Mixed or patchy evidence

0 = Not evidenced

INDIVIDUAL LEADERSHIP

PRINCIPLES

- Leadership is in every corner of your organisation. No matter what your role or seniority, you can help lead your organisation through the sustainability challenges and the Lasting Difference approach.
- A leader needs to be able to see and explain the big picture. Understanding what is happening outside the organisation and aligning opportunities and developments to the organisation's aims is critical.
- Leaders should be able to think creatively in a range of situations. They will need to act as motivators and enablers, particularly during times of change.
- Critically, a leader needs to be able to recognise and deal with uncertainty and disruption and keep communicating clearly and effectively to everyone who may be affected by changes.
- Leaders will need to adapt their leadership style according to the situation and the needs of their team.

PRACTICES – IDEAS FOR ACTION

- Make and protect time for proactive, strategic thinking. Spending too much time in reactive, operational issues puts your individual and organisational sustainability at risk.
- Keep reminding people of the vision and mission and make sure people and values remain at the centre of all the organisation's work. This can help overcome anxiety about, or resistance to, change.
- Create a constructive environment where current thinking and practices can be challenged. Model the behaviours that you want your people to have, for example: acknowledge uncertainty; ask questions; ask for and respond to feedback.
- When the organisation is facing a challenge or crisis be honest with people about the situation and what needs to happen.
- Be a reflective leader, make sure you take time to reflect on your own practice as well as lessons learnt in your organisation.

PROVOCATION:

WE ARE ALL LEADERS.

SELF-ASSESSMENT: INDIVIDUAL LEADERSHIP

	PRIORITIES	SCORE	YOUR NOTES
1	I am clear on my **personal aims and motivations** in achieving the organisation's sustainability goals and my role in bringing these about.		
2	I know the difference between **what I need to do** and what **needs to be done**. I engage others' skills and expertise to make sure we achieve our priority outcomes.		
3	I have identified our key sustainability challenges and can create time and space to **bring people together** to think creatively about potential solutions.		
4	I balance my attention between building on our project/organisational **strengths** and addressing our **gaps/weaknesses**.		
5	I give myself and others permission to **take time** for personal and professional development. I recognise when I am overloaded and take action to slow down, prioritise, and seek help.		
	PRIORITIES TOTAL =		

	PERSONAL POWER	SCORE	YOUR NOTES
1	I know my **strengths** and where I need to get help from others to implement our sustainability plans.		
2	I have identified my key allies and **sources of influence**.		
3	I receive appropriate **support** to achieve the sustainability goals I am working towards.		
4	I know what I have the **power to influence** – and what I might need to let go of.		
5	I **engage those we work with**, our stakeholders and partners to excite them about our sustainability vision and aims.		
	PERSONAL POWER TOTAL =		

Complete this section on your own or with input from others.

Consider using your answers as evidence to apply for the **Lasting Difference® Symbol**.

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NOTES FROM PART THREE

IMPLEMENTATION AND INDIVIDUAL LEADERSHIP

PART FOUR: SUSTAINABLE IMPACT AND EXIT STRATEGIES

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EXIT STRATEGY TEMPLATE 50

SUSTAINABLE IMPACT

ENCOURAGE INDEPENDENCE AND OWNERSHIP

The best way to make a lasting difference is to make sure that the people (or issues) you support need you less in future. Full independence isn't always possible or desirable. But have you done everything you can to help people strengthen their support networks, take their next steps and increase their independence? Many non-profit organisations talk about hoping to 'do themselves out of a job' by fulfilling their mission. But how close are you to making this rhetoric a reality, and how comfortable are you with it?

INCREASE INFLUENCE AND CAPACITY

Ironically, two of the biggest risks to sustainability are unchecked growth and mission drift. You need to be focused and responsible enough to accept that some issues or projects are not your 'core business'. Sometimes there are more appropriate organisations to take a project forward. Where there aren't, you still need to think carefully before filling the void.

One of the ways you can make a lasting difference is to improve other organisations' understanding of, and commitment to, your work, issues or client groups. Sustainability is about impact, not just projects. For some organisations, improving other services' policy and practice is an important sustainability goal in its own right. Improving their capacity to address or take ownership of the issues or messages you promote is another way of ensuring impact can be sustained, even if your input ceases.

LEARNING

In recent years, the trend has been for work to be funded or commissioned not just for the activities carried out, or even the outcomes achieved, but for the learning that is generated. How can you contribute to other people's learning about what works?

Even when things end, learning can help to build a bridge to the future. Indeed, sharing and preserving learning are sometimes the only way to ensure a lasting difference. For example, projects or models that wind up (e.g. due to lack of funding) can be more easily resurrected if key learning has been preserved. And to plan or fund a new project you must to be able to evidence the need for it.

For these reasons, all of the exit strategy models below place a large emphasis on learning.

SUMMARY OF POSSIBLE EXIT STRATEGIES

We might think of exit strategies as being the opposite of sustainability. But we shouldn't assume that things will always continue – or that it is necessary or appropriate for them to do so. For example, the definition of 'project' is a piece of work that has an end.

This table sets out the most common exit strategies and summarises their implications.

MODEL	CHARACTERISTICS	FUNDING	IMPACT
MAINSTREAM	The project and staff are given permanent support and funding by the host organisation. The project is mainstreamed as a core part of the organisation's work.	Existing project funding may transfer to the host organisation, or it may use reserves or new funding to finance the project.	The project continues and has continuity of service and staffing. Learning and evidence are retained.
INTEGRATING	The project is absorbed into another team or post within the organisation.	Existing project funding may be transferable to the host organisation, but funders may need assurances about project integrity and continuity. Host organisation may use reserves or new funding to finance the project.	The project continues but may have to compete with other priorities. Less development work may take place as a result. Knowledge and expertise may be lost if project staff are not retained.
RE-FUNDING	Host organisation reviews the need for and effectiveness of the project before seeking new funding.	Ongoing funding required, aligning project to other strategies, priorities and outcomes.	The project continues but its aims and outcomes may alter with each funding cycle. Levels of funding will determine the project's reach and scale.
RESTRUCTURE	Project sets up as a separate organisation, possibly community-led, volunteer-led or as a social enterprise.	The new organisation may be eligible for different funding.	The project's work continues, but without new funding its staff will be redundant. External support and resources are still required.
TRANSFERRAL	Either the project, its model or some of its work is transferred to a partner. Staff may not be retained.	Costs may be met by new host organisation or re-funding may be sought.	Project realigned to new host's priorities. Staff, volunteers and participants may be affected by or concerned about any changes.
LEGACY MATERIALS	Project may have ended. Focus on producing promotional or awareness-raising material. This could share project learning or provide resources to promote a project's messages.	Some ongoing costs need to be provided for e.g. overseeing information, webhosting, reprinting resources.	May increase awareness of topics but does not offer practical opportunities to address them.

EXIT STRATEGY TEMPLATE

Intended model for continuing or exiting your project:	
Desired outcome:	

Use this tool at the start or end of a piece of work, for planning and communicating how you will fulfil your obligations to stakeholders. Who could affect or be affected by your potential exit from a project and how will you manage this?

STAKEHOLDER	How are they involved in or affected by the exit strategy?	What actions are needed to manage this?	Who will do this?	When by?	Progress/review
PARTICIPANTS					
STAFF					
VOLUNTEERS					
FUNDERS					
PROJECT PARTNERS					
REFERRAL AGENCIES					
OTHER STAKEHOLDERS					

ABOUT WREN AND GREYHOUND

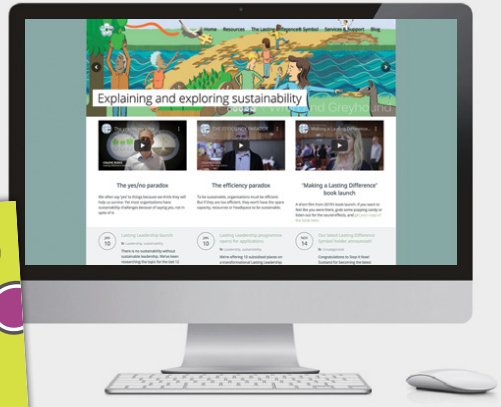
Wren and Greyhound are the creative management consultancy behind the popular suite of Lasting Difference resources. We provide a range of services to charities, social enterprises and public bodies, including:

The Lasting Difference

Workshops, e-learning, conferences and consultancy, sustaining organisations with effective strategies for:

- Involvement
- Income generation
- Impact measurement
- Innovation and improvement.

LASTING LEADERSHIP
SUCCESSION, EMPOWERMENT, EQUALITY
A guide to sustainable leadership for non-profit organisations
THE LASTING DIFFERENCE



Lasting Leadership is a guide to sustaining capacity through succession planning, lateral leadership, equalities and attracting the next generation of leaders. Free download from **TheLastingDifference.com**

THE LASTING DIFFERENCE
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Awarded to organisations working towards Lasting Difference principles.

MAKING A LASTING DIFFERENCE®

Making a Lasting Difference book

We wrote the book on non-profit sustainability.

ABOUT THIS GUIDE

This is the fifth edition of our popular guide to the complex topic of non-profit sustainability that;

- Introduces a simple definition of the subject
- Provides comprehensive frameworks for self-assessment and planning
- Suggests timelines for action
- Provides a guide to the role of implementation and individual leadership in sustainability
- Introduces a unique taxonomy of (and template for) exit strategies.

It is a free resource, shared using a Creative Commons licence. Please help us to improve future editions by sharing your feedback, comments and suggestions.

ABOUT THE AUTHORS

Wren and Greyhound are a creative management consultancy specialising in sustainable organisations and impact in the not-for-profit sectors. This toolkit was written by Graeme Reekie, with input from Jen Curran. Both are qualified managers with more than 20 years experience in non-profit leadership.

The Lasting Difference is informed by this expertise and was developed through workshops, consultancy, action learning and research with many hundreds of organisations since 2013. Neither we, nor the guide, have all the answers though! We can only find those by working together. This guide is designed to help facilitate those conversations.

LAST WORDS

SUSTAINABILITY IS A JOURNEY, NOT A DESTINATION. WE CAN'T GUARANTEE THAT YOUR WORK OR ITS IMPACT WILL BE MORE SUSTAINABLE AS A RESULT OF USING THIS GUIDE, BUT IT WILL DEFINITELY HELP YOU NAVIGATE A CLEARER PATH.

MORE INFORMATION AND SUPPORT

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Create it • Plan it • Measure it • Sustain it

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